

## Message Text

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E.O. 11652: N/A  
TAGS: EFIS, JA  
SUBJECT: JAPANESE FISHING INDUSTRY

1. BEGIN SUMMARY: JAPAN APPEARS TO BE COPING WELL IN ERA OF 200 MILE FISHERY ZONES. ACCORDING TO PRELIMINARY REPORT RELEASED BY MINISTRY OF AGRICULTURE AND FORESTRY, PRODUCTION INCREASED SLIGHTLY IN 1977 OVER THAT IN 1976. PRESS HAS REPORTED THAT LARGE FISHING COMPANIES ACHIEVED HIGH AND IN ONE CASE NEAR RECORD PROFITS IN YEAR ENDING LAST MARCH. ONE HUNDRED NINETY TWO JOINT VENTURES HAVE BEEN ESTABLISHED WITH FOREIGN FIRMS TO FURTHER ENSURE SUPPLY OF FISHERY PRODUCTS TO JAPAN. MOST AFFECTED INCREASE IN PRICES DURING 1977. END SUMMARY.

2. JAPANESE FISHERY CATCH OVER THE LAST FOUR YEARS AS FOLLOWS: 1974-10.81 MILLION METRIC TONS; 1975-10.54 MMT; 1976-10.66 MMT; 1977-10.70 MMT. WHEREAS DISTANT WATER FISHERIES DROPPED FROM 3.70 MMT IN 1974 TO 2.94 MMT IN 1976 AND TO 2.64 MMT IN 1977, INCREASES OCCURRED IN 1977 IN FISHERIES NEAR JAPANESE MAINLAND. OVER THE FOUR YEAR PERIOD PRODUCTION FROM AQUACULTURE HAS REMAINED AT ABOUT 0.9 MMT. THOUGH 1977 CATCH BY SPECIES NOT YET AVAILABLE, COASTAL SARDINE AND SAURY FISHERIES ARE KNOWN TO HAVE BEEN UNCLASSIFIED

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HIGHLY PRODUCTIVE. SARDINE CATCH WILL PROBABLY BE ABOVE 1.0 MMT ALL OF WHICH IS REDUCED TO FISH MEAL.

3. DESPITE CONTINUED HIGH FISHERY PRODUCTION, SOME ELEMENTS OF JAPANESE FISHERY SUCH AS SALMON, POLLOCK AND WHALING INDUSTRY HAVE SUFFERED. ALL JAPAN SEAMEN'S UNION REPORTS THAT 14,000 FISHERMEN HAVE LOST POSITIONS OVER

LAST YEAR, FOUR THOUSAND DUE TO RECENT SALMON AGREEMENT BETWEEN JAPAN AND SOVIETS. SEAMEN'S UNION HAS BEEN QUICK TO POINT OUT TO EMBOFF THAT HARD LINE SOVIETS TOOK WAS DUE IN PART TO HARD LINE U.S. AND CANADA TOOK IN SALMON NEGOTIATIONS. GOJ HAS RELATIVELY LIBERAL RETRAINING PROGRAMS. FISHERMEN THAT HAVE LOST JOBS BECAUSE OF INTERNATIONAL AGREEMENTS ARE ELIGIBLE FOR SPECIAL UNEMPLOYMENT ALLOWANCES OF UP TO \$454 (220 YEN/\$1) PER MONTH FOR TWO YEARS AFTER THEIR STANDARD EIGHT-MONTH UNEMPLOYMENT INSURANCE RUNS OUT, AND, FURTHER, ARE AUTHORIZED RETRAINING FOR OTHER INDUSTRY AT GOVERNMENT EXPENSE. THOUGH MOST WISH TO REMAIN IN FISHERIES, OPPORTUNITIES APPEAR BLEAK.

4. RECENT NEWAPAPER ARTICLES REPORT PROFITS OF LARGE FISHERY COMPANIES AT NEAR RECORD LEVEL FOR SOME. NIPPON SUISAN IS REPORTED TO HAVE HAD RECORD SALES AND ITS SECOND LARGEST ANNUAL PROFIT. OTHER COMPANIES ALSO REPORTED DRAMATIC INCREASE IN PROFITS. TO SOME EXTENT THIS HAS BEEN AT EXPENSE OF CONSUMER. FISH PRICES TO CONSUMER ROSE LAST YEAR ABOUT 15 PERCENT WHICH MAY BE ACCELERATING TREND IN ANIMAL PROTEIN CONSUMPTION FROM FISH TO MEAT. THREE DECADES AGO ABOUT 70 PERCENT OF ANIMAL PROTEIN WAS FROM FISH WHEREAS IN RECENT YEARS ABOUT 50 PERCENT IS PROVIDED BY FISH.

5. JAPAN ECONOMIC JOURNAL REPORTS THAT JOINT VENTURES  
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ASSUMING LARGER ROLE IN FISHING INDUSTRY. JAPAN INDUSTRY HAS ESTABLISHED 192 FIRMS JOINTLY WITH FOREIGN INTERESTS - 71 ARE INVOLVED IN FISHING OPERATIONS, 31 IN CULTIVATION AND 90 IN FREEZING AND PROCESSING. THIRTY TWO FIRMS ARE ENGAGED IN CANNING AND FREEZING IN U.S.

6. MAJOR CONCERNS IN FISHING INDUSTRY ON FISHERY ISSUES OF COMMON INTEREST TO UNITED STATES AND JAPAN APPEAR TO BE SATISFACTORY RESOLUTION, FROM JAPAN'S POINT OF VIEW, OF PUSH IN U.S. CONGRESS TO REDUCE ALLOCATIONS TO THOSE COUNTRIES WHO RESTRICT OR DO NOT ALLOW IMPORT OF FISHERY PRODUCTS, RESOLUTION OF PROBLEMS IN MANAGEMENT OF HIGHLY MIGRATORY SPECIES SUCH AS TUNAS AND, TO A LESSER DEGREE, NOW THAT SALMON NEGOTIATIONS HAVE BEEN COMPLETED, MAINTENANCE OF HIGH SEAS SALMON FISHERY. MANSFIELD

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